Department of Education
Financial Student Assistance (FSA)
Content Management
Functional Processes & Procedures

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DOCUMENT HISTORY

This shows updates that have been made to this document.

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	Oct-00	1.0	Initial Release
Lisa Phillips/Josh Stauffer	11-Oct-01	2.0	Updates made to reflect Interwoven upgrade
Mark Mandrella	31-Oct-01	3.0	Updates made to reflect Interwoven upgrade and grammar changes
Mark Mandrella	26-Dec-01	3.1	Updates made to reflect Marcello's comments
Lisa Phillips	28-Mar-02	3.2	Updates made to reflect Marcello's comments and additional notes from Mark and Dorothy

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1.0 Introduction

Background

Until recently, most enterprises used web channels only as a means to disseminate relatively static (stable and uniform) information. Today's enterprises are building highly dynamic sites where content is not only updated on a daily basis, but often changing in real-time using highly complex sites. Enterprises in today's high tech economy are facing both growing traffic and volume at online sites; and as a result, there is significant growth in the amount of content contained by their websites. In general, the aging methods and techniques for maintaining online content are time-consuming, costly and inefficient. There was a growing need to enable businesses to update and maintain content in a more direct and timely fashion causing a rise in demand for specialized content management processes and applications.

The intent of this document is to present a comprehensive, integrated view of web content management. We will introduce the working definitions of the terms "web content" and "web content management", and describe the various types of web content and the key content characteristics that apply to FSA. The process for IFAP and Schools Portal web content management will be discussed at high-level and then broken down into specific roles, tasks, and procedures. Finally, we will focus on Interwoven's TeamSite™, and how this web content management tool will be used to enable FSA's web content management process.

What is Web Content?

Web content can be made very simple. It can be an icon, a headline, a publication, audio tracks, video film clips or news updates. Web content is collectively the text, audio/video, graphics, and applications that comprise the end-user's total experience online. For the working definition we'll define **web content** as any discrete component that can be stored digitally, managed as a piece of meaningful content and distributed to one or more web based channels. The content for the FSA's Schools Portal and Information for Financial Aid Professionals (IFAP) are in the form of news updates, headlines, calendar events, publications, policies and procedures. The **Web Shop** (Schools Channel Customer Service Call Center/ IFAP-SP team) will utilize the content management software (Interwoven's TeamSite™) and content development tools (such as Dreamweaver, Word, etc.) to manage and deliver the content from the business unit to the web shop to publication on the server.

IFAP web content is primarily static content containing text files and graphics. IFAP content includes FSA headlines and publications.

The Schools Portal web content is primarily static content containing text files and graphics. Content on the Schools Portal includes FSA headlines, a calendar of events, and links to several FSA websites.

What is Web Content Management?

Web content management is a set of tasks and processes that manages the addition, revision, and deletion of the content targeted for publication on the web from the content's creation to archiving. The **content management workflow** is the set of actions that take the content through development to production. This is the system for defining the necessary steps for creation and approval. The content management workflow includes user tasks and a variety of automated tasks.

FSA Web Content Management Process Architecture

High Level (Tier 1) Web Content Management Process Architecture

FSA's web content management processes are based on the premise that there will be a centralized web shop to manage the content posted to IFAP and the Schools Portal. The Tier 1 Web Content Management Process Architecture contains three core processes: Content Creation, Content Management and Content Delivery. Interwoven's TeamSite™ software technically enables these processes by providing a flexible and scalable solution for managing web content.

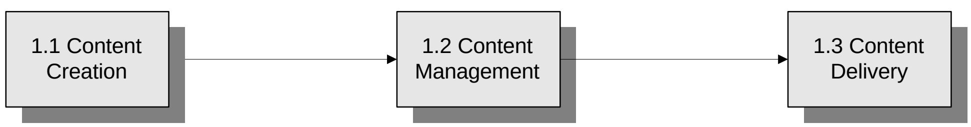


Figure 1 – High Level (Tier 1) Web Content Management Architecture

Detailed (Tier 2) Web Content Management Process Architecture

The Tier 2 view of the Web Content Management processes provides a detailed view of how an idea for content gets published to either IFAP or the Schools Portal. 'Designated' Content Managers and the Schools Channel Customer Service Call Center will use these processes on a daily basis.

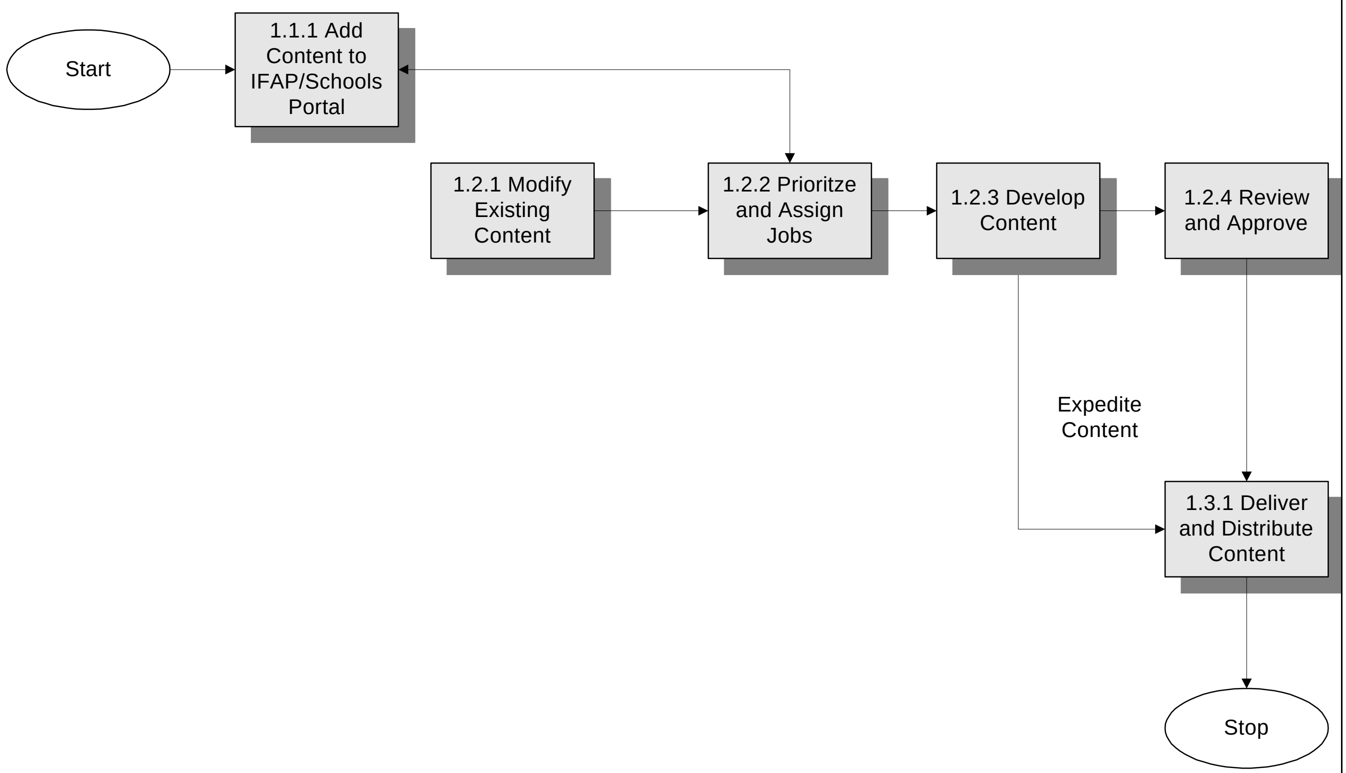
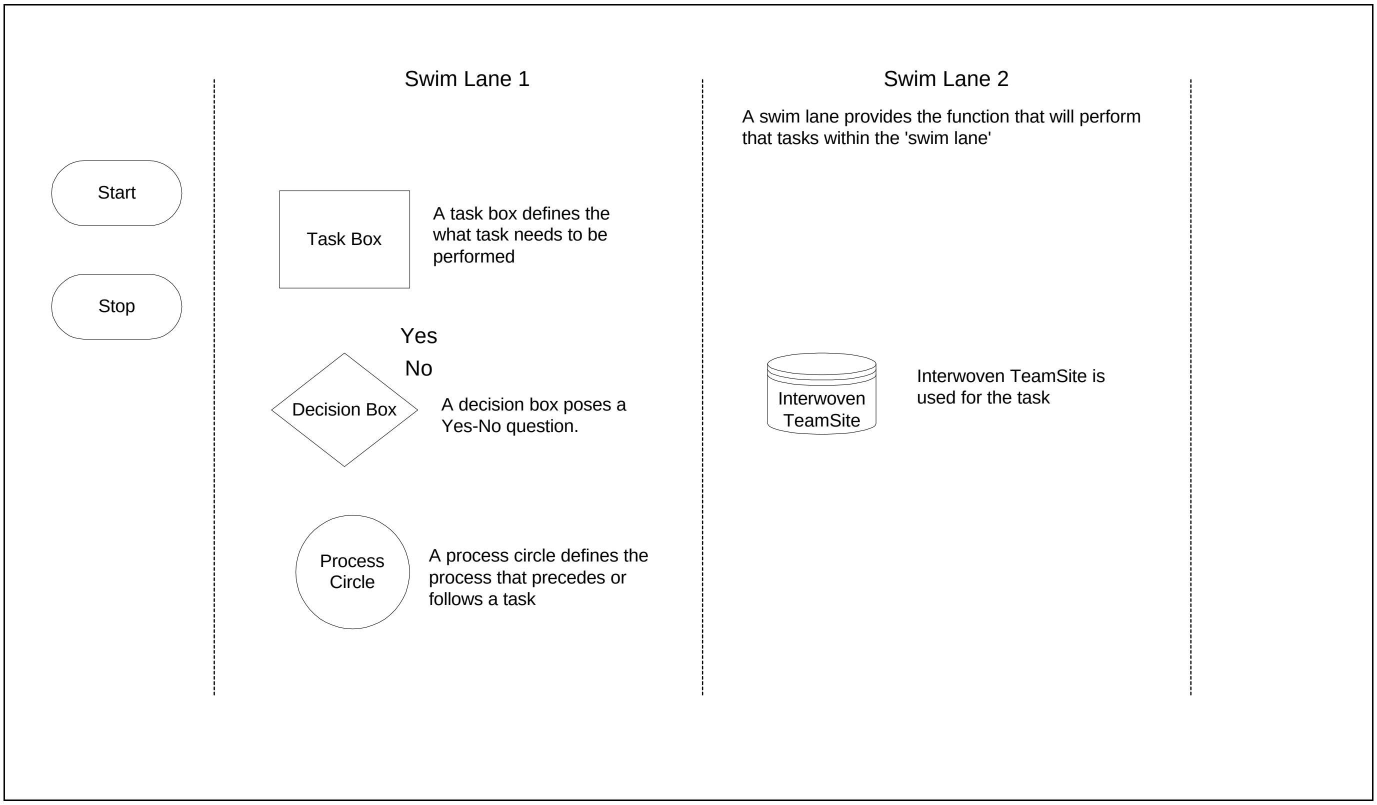


Figure 2 – Detailed (Tier 2) Web Content Management Architecture

Ref. #	Process Description	Responsibility/ Process Owner	Tools	Outcomes
1.1.	**Content Creation** – This process defines the actions to be undertaken by the designated Content Managers within the FSA business units. Ideas are formulated within the business units by Content Contributors. The Content Contributor documents his/her idea in the appropriate format for the Content Manager in his/her business unit. Each business unit has a Content Manager who will review and approve the content and send an email request to the Schools Channel Customer Service Call Center. The Content Manager provides a description of the work to be done and attaches any necessary files to the email.	Designated Content Managers within the FSA business units	Content creation tools such as Word, Excel, PowerPoint and HTML editor tools and Interwoven TeamSite™	Content idea formulated, documented and forwarded via email to the Schools Customer Service Call Center
1.2	**Content Management** – This process defines the actions to manage content once it has been received by the Schools Channel Customer Service Call Center. The Schools Channel Customer Service Call Center IFAP/Portal coordinator reviews the email request, creates a job in Interwoven, and assigns the job to an IFAP/Portal Team Member. A workarea for the job is also selected. The Schools Channel Customer Service Call Center staff view the assigned job and develop the content via an Interwoven template. Once the content is created, a different member of the Schools Channel Customer Service Call Center will perform a quality review of the content and approve the content. The review also ensures that it conforms to FSA style guide, usability, and accessibility guidelines. The content is then deployed to the staging area within Interwoven where it is ready for deployment to the IFAP and/or Schools Portal web server and database.	Schools Channel Customer Service Call Center IFAP/Portal coordinator and staff	Interwoven TeamSite™	Content is prioritized and jobs are created within Interwoven. Jobs are assigned and content is created via Interwoven templates. A quality review is performed; content is approved and submitted to the staging area within Interwoven.
1.3	**Content Delivery –** This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP/Portal team with support from the IFAP/Schools Portal Applications Management team and Virtual Data Center (VDC). The Schools Channel Customer Service Call Center IFAP/Portal team member conducts a final review of the entire site (within the staging area) prior to publishing a new edition of IFAP or the Schools Portal. Then, the Schools Customer Service Call Center IFAP/Portal team member deploys the new content to the production server and related database.	Schools Customer Service Call Center IFAP/Portal team member, IFAP/Portal Applications Management team, and Virtual Data Center	Interwoven TeamSite™, Open Deploy and Data Deploy.	New edition of IFAP and/or Schools Portal deployed to the production server and database

Process Workflow Diagram Legend

The following pages include detailed process workflow diagrams for the web content management processes. Listed below is a legend of symbols that will be used to illustrate these processes.



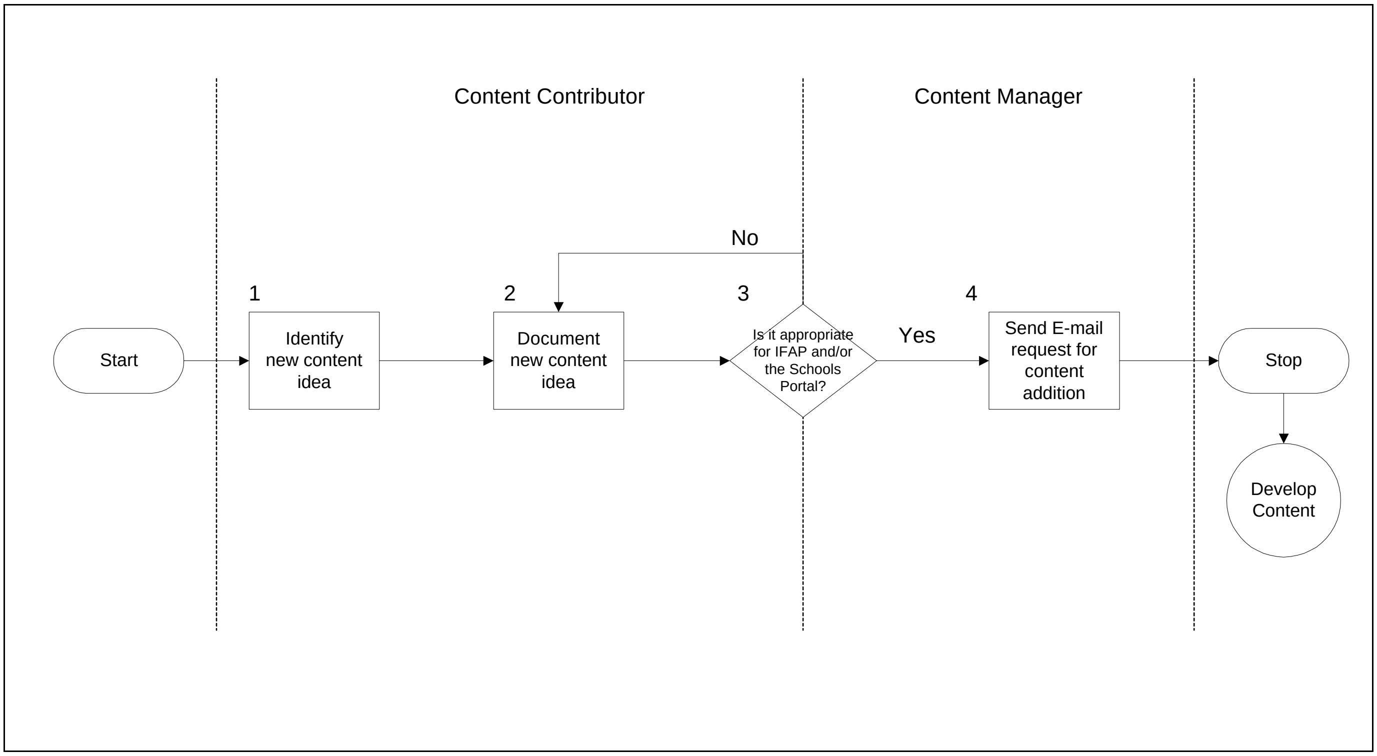
1.1 Content Creation Process (Recommended)

The content creation process defines the recommended actions to be undertaken by the designated Content Managers within the FSA business units. Ideas are formulated within the business units by Content Contributors. The Content Contributor documents his/her idea in the appropriate format for the Content Manager[1] in his/her business unit. Each business unit has a Content Manager who will review and approve the content and send an email request to the Schools Channel Customer Service Call Center. The Content Manager or the designee provides a description of the work to be done and attaches any necessary files to the email.

1.1.1 Add Content to IFAP/Schools Portal (Recommended)

This process defines the actions to be undertaken by Content Contributors and Content Managers. Authorizers within the business unit request the addition of new content to IFAP and/or the Schools Portal. This process is used for *new* content that is being added to IFAP and/or the Schools Portal for the *first* time.

1.1.1 Add Content to IFAP/Schools Portal Process Workflow



[1] CSCC Maintains a list of Content Managers to approve content for publication to the IFAP and Schools Portal web site. Individuals interested in being added to the list must have their manager, who is already on the list, request that they be added and at what capacity.

1.1.1 Add Content to IFAP/Schools Portal Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Identify New Content Idea – The Content Contributor identifies information or has an idea that is relevant for posting on IFAP and/or the Schools Portal.	Content Contributor within an FSA business unit	N/A	Content idea formulated
2.	Document New Content Idea – The Content Contributor documents the content idea within the appropriate tool. This step takes it from idea to content documented in a tool. It is forwarded to the Content Manager for review.	Content Contributor within an FSA business unit	Microsoft Office suite of tools or FSA standard HTML editor	Content idea created

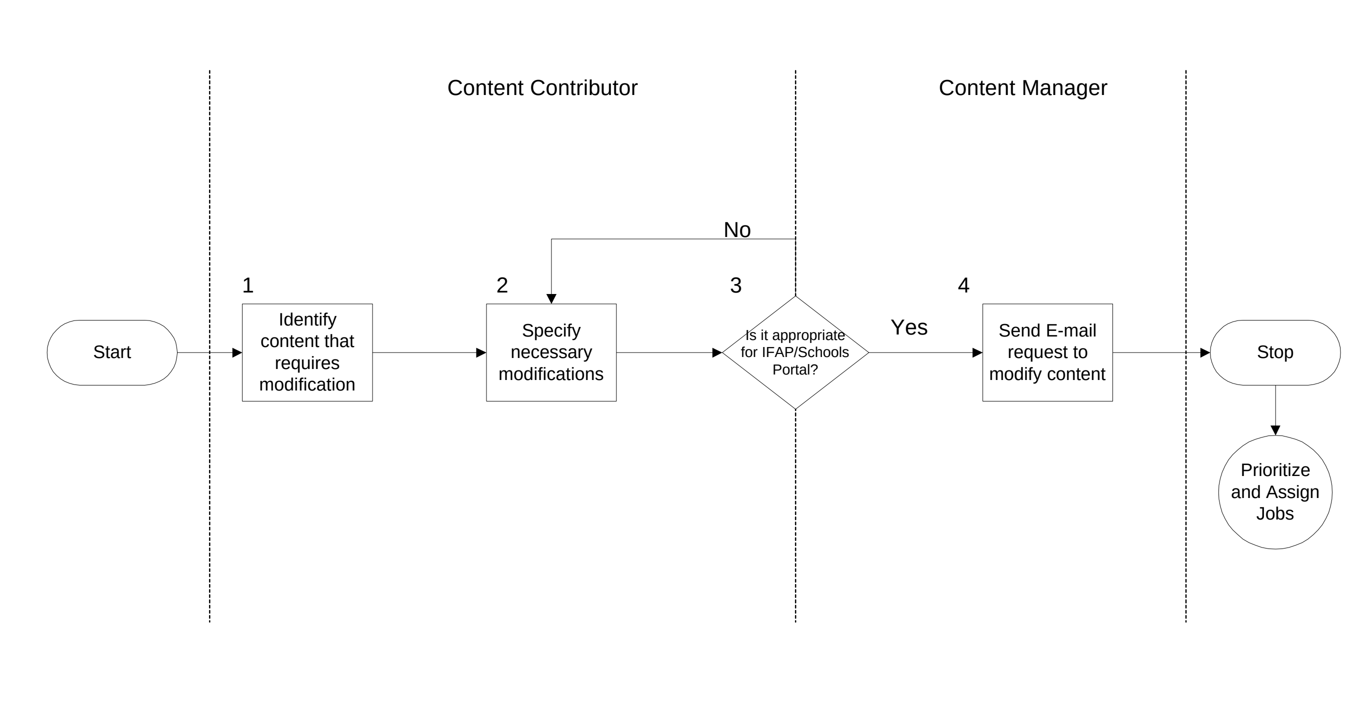
3.	Is it Appropriate for IFAP and/or the Schools Portal? – This is a checkpoint to make sure the right information is going to the right audience at the right time. Grammar, spelling and accuracy are also checked at this point.
	
	If (Yes) – The process continues on with step 4.
	If (No) – The Content Manager communicates the required changes and the process goes back to step 2
		Content Manager	N/A	Content idea reviewed and approved

4.	Send an E-mail Request for Content Addition – The Content Manager within each channel who is responsible for pushing all new content to the content shop sends an E-mail request with a description of the work to be done and attaches any necessary files. This request is sent to the Schools Channel Customer Service Call Center.	Content Manager	FSA email	E-mail request submitted to Schools Channel Customer Service Call Center
Stop				

1.1.2 Modify Existing Content on IFAP/Schools Portal (Recommended)

This process defines the actions to be undertaken by Content Contributors and Content Managers to modify existing IFAP and/or Schools Portal content.

1.1.2 Modify Existing Content on IFAP/Schools Portal Process Workflow



1.1.2 Modify Existing Content on IFAP/Schools Portal Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Identify Content That Requires Modification – The Content Contributor periodically reviews his/her content on IFAP/Schools Portal to determine if content is inaccurate or outdated[2]. The Content Contributor identifies information that requires modifications.	Content Contributor within an FSA business unit	N/A	IFAP/Schools Portal content that requires modification identified
2.	Specify necessary modifications – The Content Contributor modifies the existing IFAP/Schools Portal content and forwards it to the Content Manager for review.	Content Contributor within an FSA business unit	Microsoft Office suite of tools or FSA standard HTML editor	Specific modifications documented

3.	Is it Appropriate for IFAP/Schools Portal? – This is a checkpoint to make sure that this is the right information going to the right audience at the right time. Grammar, spelling and accuracy are also checked at this point.
	
	If (Yes) – The process continues on with step 4.
	If (No) – The Content Manager communicates the required changes and the process goes back to step 2
		Content Manager/ Authorizer	N/A	Modified content reviewed and approved

4.	Send an E-mail Request for Content Modification – The Content Manager within each channel sends an E-mail request with a description of the work to be modified and attaches any necessary files. This request is sent to the Schools Channel Customer Service Call Center.	Content Manager/ Authorizer		E-mail request submitted to Schools Channel Customer Service Call Center
Stop				

2 Outdated data is usually placed in the archive area of IFAP.

1.2 Content Management Processes

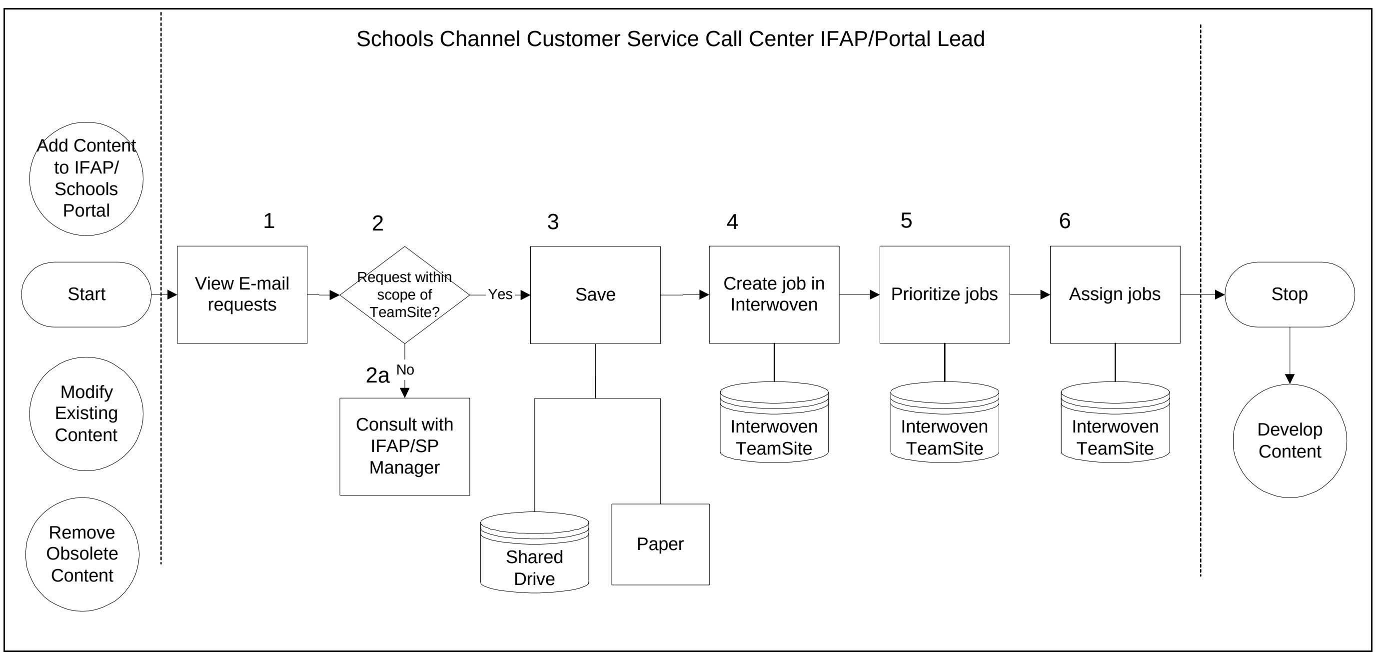
This process defines the actions to manage content once it has been received by the Schools Channel Customer Service Call Center. The Schools Channel Customer Service Call Center content coordinator reviews the E-mail request, saves[3] all electronic documents, formats a job in Interwoven, and assigns the job to a IFAP/Portal team member. A workarea for the job is also selected. The Schools Channel Customer Service Call Center IFAP/Portal team member views the assigned job and processes the content via an Interwoven template. Once the content is formatted, a different IFAP/Portal team member of the Schools Channel Customer Service Call Center will perform a quality review of the content and approve the content. The review also ensures that it conforms to FSA Style Guide, usability and accessibility guidelines. The content is then migrated to the staging area within Interwoven where it is ready for deployment to the IFAP and/or Schools Portal web server.

Content management processes include modifying existing content on IFAP/Schools Portal, removing obsolete content from IFAP/Schools Portal, prioritizing and assigning jobs, processing content for IFAP/Schools Portal, and reviewing and approving content.

1.2.1 Prioritize and Assign Jobs

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP/Portal coordinator to receive email requests from Content Managers, prioritize these requests and assign the requests to the IFAP/Portal Team Member.

1.2.1 Prioritize and Assign Jobs Process Workflow



[3] All original files are saved to the CSCC shared drive.

1.2.1 Prioritize and Assign Jobs Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	View E-mail requests – The Schools Channel Customer Service Call Center IFAP/Portal Coordinator reviews email requests and attachments from Content Managers.	Schools Channel Customer Service Call Center IFAP/Portal Coordinator	ED E-mail	E-mail requests reviewed

2.	Is the request within the scope of TeamSite or will it require processing by the IFAP/ SP Application management team?
	
	If (Yes) – The process continues on to step 3.
	
	If (No) – The process continues on to step 2a.
		Schools Channel Customer Service Call Center IFAP/Portal Coordinator		

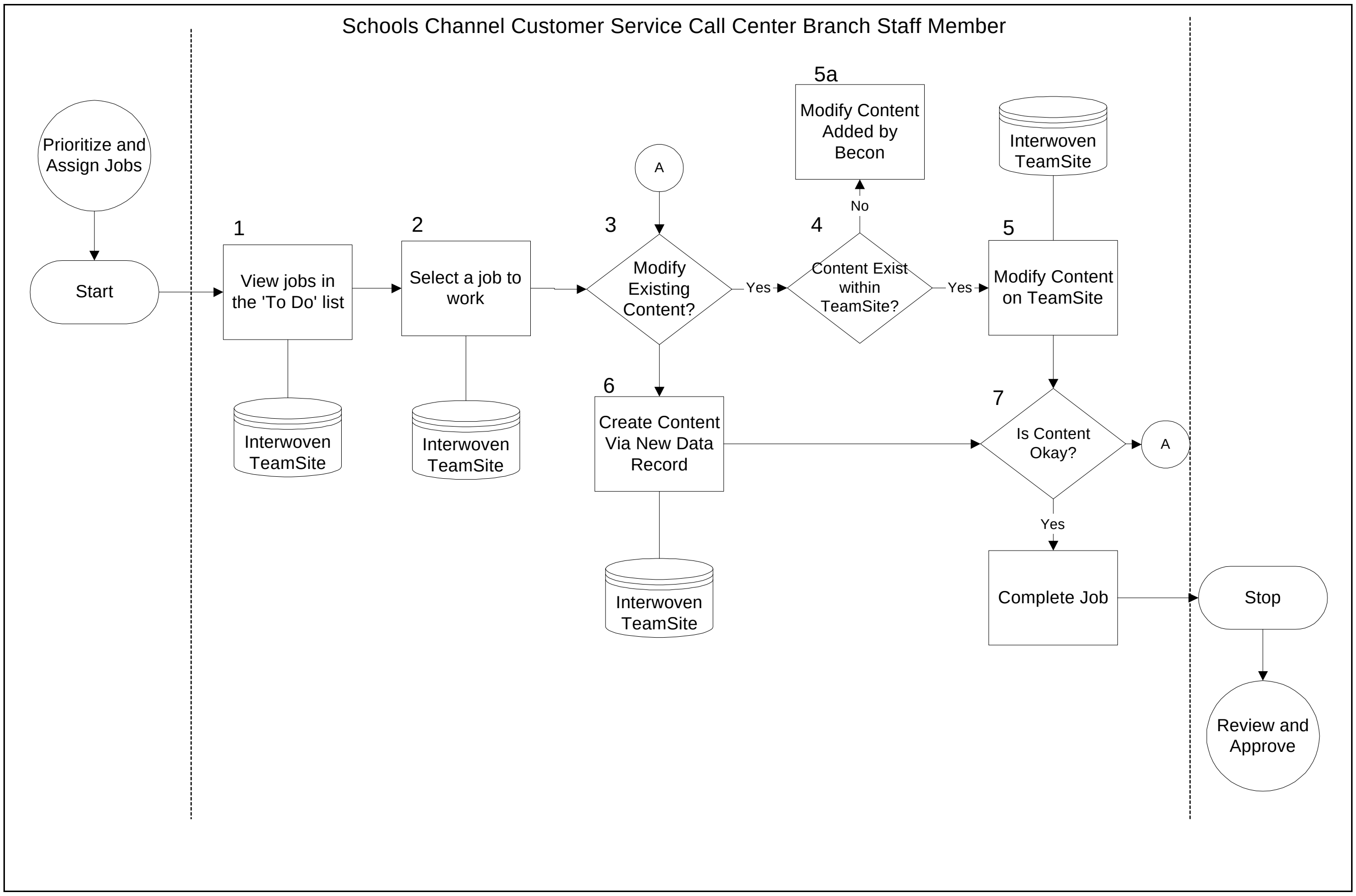
2a.	Consult with IFAP/SP manager/lead for procedures to assign a task to the IFAP/ SP Application Management team. Then stop.	Schools Channel Customer Service Call Center IFAP/Portal Coordinator		Job Assigned to IFAP/SP Application Management team
3.	Save – the Schools Channel Customer Service Call Center IFAP/Portal Coordinator will save and/or file electronic and paper documents to their respective areas. Electronic files are saved to CSCC's shared drive. Paper documents are filed in CSCC's library.	Schools Channel Customer Service Call Center IFAP/Portal Coordinator	EDNET	Library maintained
4.	Create Jobs in Interwoven – The Schools Channel Customer Service Call Center IFAP/Portal Coordinator logs onto Interwoven TeamSite and creates a job for the request.	Schools Channel Customer Service Call Center IFAP/Portal Coordinator	Interwoven TeamSite™	Interwoven job created
5.	Prioritize the job – The Schools Channel Customer Service Call Center IFAP/Portal Coordinator identifies the priority for the job in the Comments.	Schools Channel Customer Service Call Center IFAP/Portal Coordinator	Interwoven TeamSite™	Job prioritized
6.	Assign the job - The Schools Channel Customer Service Call Center IFAP/Portal Coordinator assigns the job to a Schools Channel Customer Service Call Center staff member.	Schools Channel Customer Service Call Center IFAP/Portal Coordinator	Interwoven TeamSite™	Job assigned to staff member

Step #	Step Description	Responsibility	Tools	Outcomes
Stop				

1.2.2 Process Content

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center staff to develop content.

1.2.2 Process Content Workflow



1.2.2 Process Content Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	View Jobs in the 'To Do' List – The Schools Channel Customer Service Call Center IFAP/Portal team member reviews jobs in his/her 'To Do' list.	Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	'To Do' list reviewed
2.	Select a Job to Work – The Schools Channel Customer Service Call Center IFAP/Portal team member selects a job to work based on priority entered by the IFAP/Portal coordinator in the Comments.	Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	Job selected

3.	Is the Job to Modify Existing Content?
	
	If (yes) go to step 4
	If (no) go to step 6
		Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	

4.	Does the content exist within TeamSite?
	
	If (yes) go to step 5
	If (no) go to step 5a?
		Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	

5.	Modify content on TeamSite - Add files to be modified to a job. - Edit the files. - Go to step 7	Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	Content modified
5a.	Modify content not on TeamSite - Download the files from the web. - Import files to TeamSite. - Edit the files. - Go to step 7	Schools Channel Customer Service Call Center IFAP/Portal team	HTML Editing Tool, Interwoven TeamSite™	
6.	Create Content Via a New Data Record[4] (Template) - The Schools Channel Customer Service Call Center IFAP/Portal team member enters the content provided in the appropriate template and saves this record.	Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	Content created

[4] CSCC maintains field descriptions of all fields for all template types. In the future these descriptions will be added to this document as an appendix.

Step #	Step Description	Responsibility	Tools	Outcomes

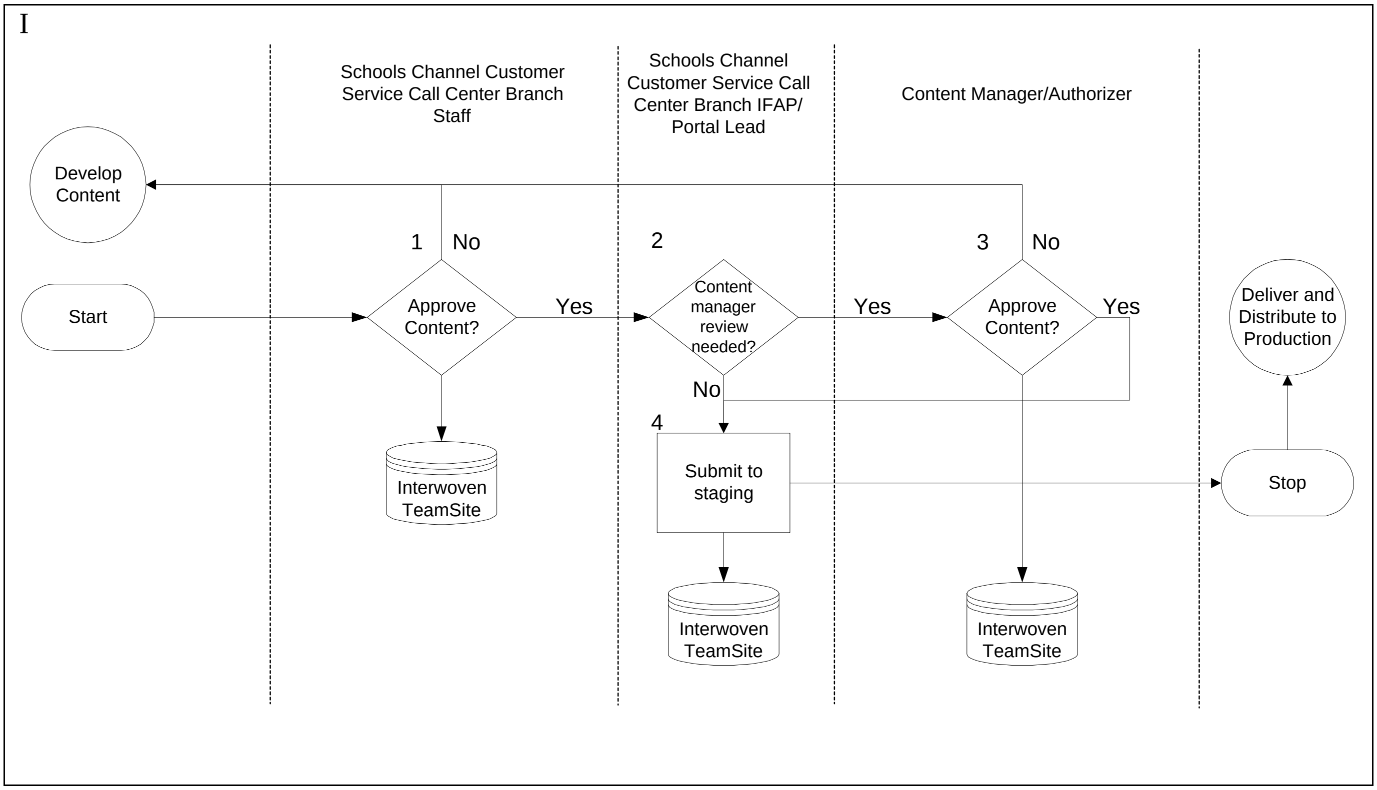
7.	Is Content Okay? - The Schools Channel Customer Service Call Center IFAP/Portal team member previews the content and reviews it to ensure that it is accurate (grammar, spelling and content) and the presentation is correct.
	
	If (Yes) – The process continues on with step 8
	If (No) The process reverts back to step 3 and the appropriate changes are made
		Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	Content reviewed

8.	Complete Job - The Schools Channel Customer Service Call Center IFAP/Portal team member indicates the job is done and provides any necessary comments for the reviewer.	Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	Job completed
Stop				

1.2.3 Review and Approve Content

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP/Portal team member to review and approve content and submit content to staging.

1.2.3 Review and Approve Process Workflow



1.2.3 Review and Approve Content Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				

1.	Approve Content? – The content is assigned to the Schools Channel Customer Service Call Center staff for review to determine if it is consistent with FSA design standards and accessibility guidelines.
	
	If (Yes) – The process continues on with step 2.
	If (No) – The Schools Channel Customer Service Call Center IFAP/Portal team member communicates needed changes and the process goes back to the 1.1 Content Creation.
		Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	Content reviewed

2.	Content Manager Review Needed? – Based on the type of content, the Schools Channel Customer Service Call Center IFAP/Portal coordinator will determine if the content needs to be previewed in a test environment (i.e. IFAP development server) for review and approval by the Content Manager who submitted the content. Also make sure that step by step procedures are added to the 2.0 Fuctional Procedures of how to add content to IFAP development server and supply the URL of where the document can be found.
	
	If (Yes) – The process continues on with step 3.
	If (No) – The process skips step 3 and proceeds to step 4.
		Schools Channel Customer Service Call Center IFAP/Portal team	Interwoven TeamSite™	Decision regarding whether the Content Manager needs to approve the content

3.	Approve Content? – The content is reviewed by the Content Manager/ Authorizer to determine if the content should be authorized for production.
	
	If (Yes) – The process continues on with step 4.
	If (No) – The Content Manager/ Authorizer communicates needed changes and the process goes back to the Develop Content process.
		Content Manager	Interwoven TeamSite™	Content reviewed and approved by Content Manager

4.	Submit to Staging – The Schools Channel Customer Service Call Center IFAP/Portal team member submits the content to the TeamSite™ staging area where the entire site resides as a read-only copy.	Schools Channel Customer Service Call Center Staff IFAP/Portal team	Interwoven TeamSite™	Content submitted to staging

Step #	Step Description	Responsibility	Tools	Outcomes
Stop				

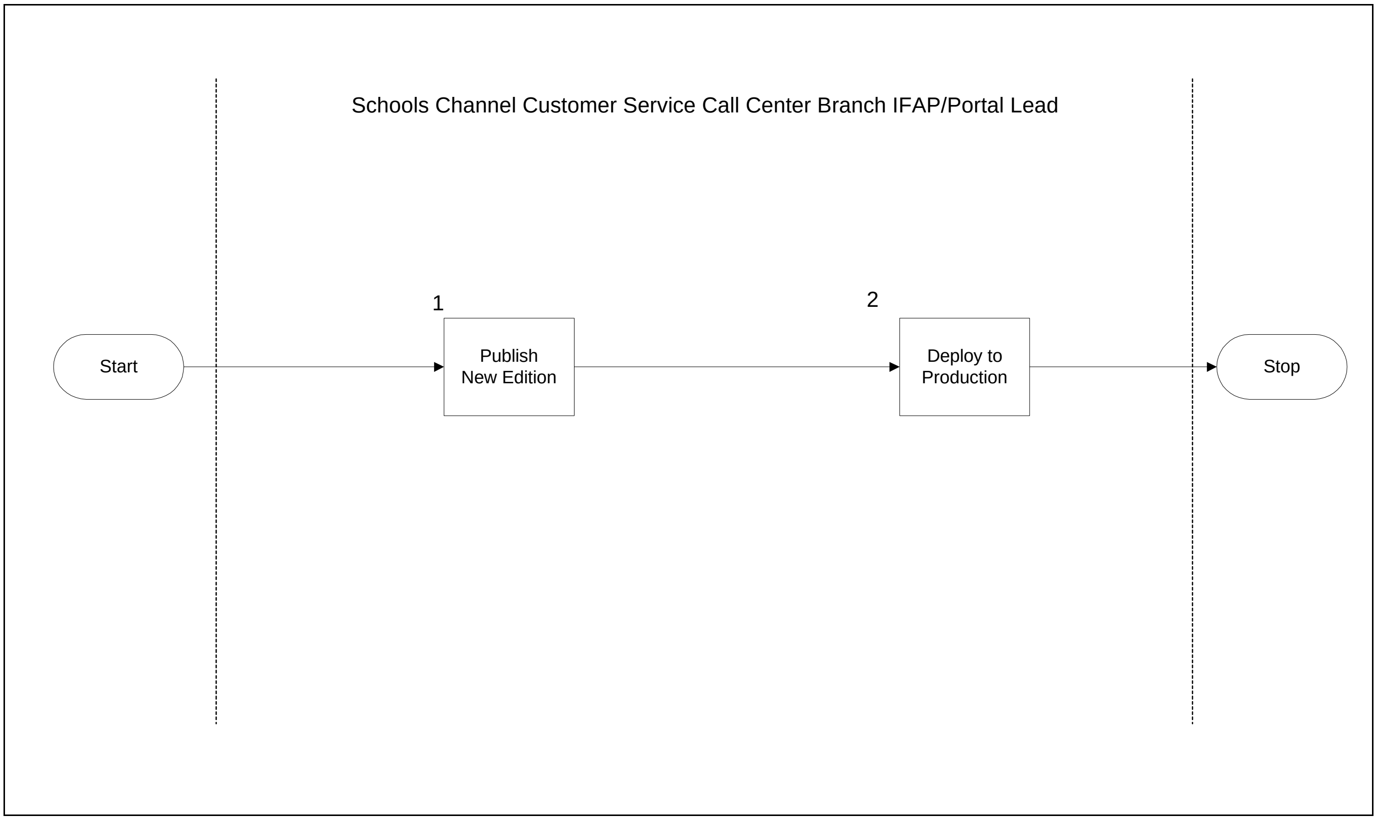
1.3 Content Delivery Processes

The Schools Channel Customer Service Call Center IFAP/Portal coordinator (with an administrator TeamSite™ role) will deploy the site to the production server using Interwoven Open Deploy and to the production database using Data Deploy.

1.3.1 Deliver and Distribute to Production

This process defines the actions to be undertaken by the Schools Channel Customer Service Call Center IFAP/Portal coordinator to deliver and distribute new content of IFAP and/or the Schools Portal to production. Users can view the new content.

1.3.1 Deliver and Distribute to Production Process Workflow



1.3.1 Deliver and Distribute to Production Process Workflow Description

Step #	Step Description	Responsibility	Tools	Outcomes
Start				
1.	Publish New Edition – After the content has been submitted to staging, the Schools Channel Customer Service Call Center IFAP/Portal coordinator publishes a new edition of IFAP and/or the Schools Portal. [Are new editions needed? if not please remove from this step.	Schools Channel Customer Service Call Center IFAP/Portal coordinator	Interwoven TeamSite™	New edition of IFAP and/or the Schools Portal created
2.	Deploy to Production – The new edition of IFAP and/or the Schools Portal is deployed to the production server using Interwoven Open Deploy and production database using Data Deploy. This can be a manual or automated process. What is the automated process please provide details?	Schools Channel Customer Service Call Center IFAP/Portal coordinator	Interwoven Open Deploy and Data Deploy	New edition of IFAP and/or the Schools Portal deployed to the production server and database. Available for viewing by users
Stop				

2.0 TeamSite Functional Procedures

Quick Tips and Tactics

This section lists various "tips" that users may find helpful when using the TeamSite™ application:

Getting the Latest Content

- After identifying which content is needed (e.g. Schools Portal Calendar, Direct Loan Bulletin, etc.) determine where in the directory structure the content is stored.
- All Schools Portal content (excluding sfalinks) is located in the following directory: /templatedata/sp/content_type/data
- For each IFAP publication type content is located in two directories:
  /publication_type
  /templatedata/(ifap or loan)/publication_type/data
- To update the directories check the box next to the directory and press the Get Latest button in the button bar. This will update the selected directories with the latest files from the staging area. Remember that both directories must be updated to ensure good data for all IFAP publications.
- Follow the Editing a Publication already in TeamSite procedure, which was previously distributed.

Editing Hyperlinks in Word

- Once a file is open in word highlight the link text. From the Insert menu select HyperLink. Enter the fully qualified path (e.g. http://www.ifap.gov) into the top field and press OK.
- This can be used to create new hyperlinks or edit existing ones.

Schools Portal Links File and Contact Page

- Content is stored in following directory:
  /HTMLDocs
- Files exist under this directory named sfalinks and contacts.htm, and edit the HTML page is needed for the sfalinks page and Contact Page.
- Inform Accenture DBA to update the fsa_links table in the Schools Portal database, so fsa links update can be propagated to the customer's "'My FSA" pages and the "Customize MY FSA Links" personalization feature.

Adding Attachments to Documents

- Templates for all IFAP publications contain a section that allows the users to add attachments to the HTML file. Attachment files must be saved in the attachments directory under the corresponding HTML file directory in the users workarea.
- Two fields must be filled out to complete the attachment, label and link. Label is the highlighted text on the HTML page that the website user will click to get to the attachment. Link is the path to the attachment.
- To properly populate the link field press the browse button and select the appropriate file from the list. Only the files listed in that publications attachment directory will be listed.
- If more than one attachment is required, press the Add Attachments/Enclosures button and another label/link pair of field will be placed on the template. Repeat as necessary.
- Remember to include all attachment files into the workflow of the publication. The attachments will not be deployed to the website unless they are bundled with the publication.

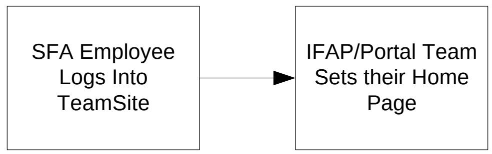
Naming Convention Tips

- When entering a date, the format should be yyyy-mm-dd unless otherwise specified by the description.
- When creating file names please do not use special characters, dashes or spaces in the file name
- Interwoven is case sensitive. Make sure that, when entering file or branch information, you remember to match the case in the name you type and the actual file/branch name.

Browser Setting Tips

- Make sure your internet browser is set to refresh each time a page is visited. To do this in Internet Explorer, go to Tools→ Internet Options. On the "General" tab, under "temporary internet files," select "settings" and select "every visit to the page." Press the **OK** button. In order for the settings to take effect, you must close your browser and restart it.
- The link to the IFAP development site is http://test.ifap.ed.gov:8532.
- The link to the IFAP test site is http://dev.ifap.ed.gov:8531.
- The link to the Schools Portal test site is http://actest.schoolportal.ed.gov:8182
- To determine how long it will take to download a file using a 56k modem please refer to the formula below: (This formula is useful for those files that are very large)
  - (File size in Kilobytes x 10)/56 = time in seconds to download on a 56k modem.
  - If the result is greater than 60, divide it by 60 to get time in minutes.
- Compress large files for download by using Winzip.

Accessing TeamSite



Section 2.0 will cover the first step of using Interwoven's TeamSite™ Application Software. In this section, you will learn how to log on to TeamSite and Set up your Home Page. When logging into TeamSite™ for the first time, LaunchPad will automatically download and install on your local computer. LaunchPad is a small helper application that resides on you local computer, which allows you to make associations between file types and the editing applications you use. It's totally transparent to the user; you don't have to do anything.

Note – the first time a user creates or edits a Data Content Record (DCR), the Visual Format program will install on the user's machine. The Visual Format tool will allow rich text formatting within a designated field within the data capture template

Logging Into TeamSite

IFAP/Portal Team Logs Into TeamSite

These procedures are written for users with Microsoft Internet Explorer Browsers. Other browsers, like Netscape browsers, may be used. However, additional steps may need to be performed due to differences in functionality. Following the entire sequences will reduce any uncertainty while executing the procedural steps for browsers other than Internet Explorer.

Process	Steps
IFAP/Portal team Logs into TeamSite for Content Management Tasks.	• Click your **TeamSite/Browser** Icon from your desktop • From the **Login as** pull-down menu**,** select your user type (i.e. author, editor, or administrator) • Enter your **Username** in the **Username** field • Enter your **Password** in the **Password** field • Check the WebDesk box if you want to use the WebDesk interface (for Authors only) • Click the **Login** button. • To log out of TeamSite™, press the **Logout** button located in the lower left-hand corner of the screen. You will be returned to the Login screen. **For WebDesk Users:** • From the Login screen, enter your Username, Password, and select **Author** as your "Login as" type. • Check the WebDesk checkbox and press the **Login** button.

Note: The first time you log into TeamSite™, the Launch Pad application will automatically be installed on your local machine. *This is a one-time occurrence.* However, the first time you edit a file through TeamSite™, your browser may display a dialog asking you whether or not you want to give permission to run the Launch Pad applet. If this dialog appears, click **yes**. Also, if you click the "Always trust" check box, this dialog will not appear again.

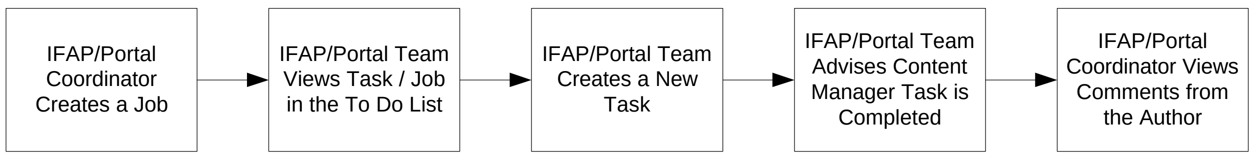
Note: To change your TeamSite password, please contact a member of the Applications Support Team who will update your password in Unix. There is currently no method to update your password through TeamSite.

Setting your Home Page

IFAP/Portal Team Sets their Home Page

Process	Steps
IFAP/Portal team sets their Home Page.	**NOTE:** Your Home Page will be stored on the TeamSite™ Server. You can change this setting at any time, or reset it to the default setting (the default home page is the list of jobs you own). • In the TeamSite™ GUI, navigate to the location or workflow view that you would like to go to after logging in. • Click the **Edit** pull down menu • Click **Set Home Page**

Completing Tasks



This section will cover the procedures to complete a Task. This area describes how the IFAP/Portal coordinator will create a Job and the steps the contributor will take to view the Job. Next the contributor will accomplish the Task and send their comments back to the IFAP/Portal team so they know the task has been completed; the contributor can also provide additional comments for the IFAP/Portal coordinator, if necessary. The last part of this section covers how the IFAP/Portal team will view the contributor comments concerning the Task they completed and how to view all Tasks / Jobs listed in TeamSite.

Creating a Job in the To Do List

IFAP/Portal Coordinator Creates a Job

Process	Steps	What you will see!
IFAP/Portal coordinator Creates a Job for the FSA Employee.	1. **Log in** as an **Editor or Higher**. • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. 2. **Create the New Job** • Click the **File** pull down menu • Select **New Job** • Click the **Button** next to the workflow template you want to use (currently there is only one choice – Single **Approver**) • Enter descriptive comments in the "Enter a Description for the New Job" field • Click **New Job** • Select the username of the appropriate contributor. This person will be the one formatting the content. • Enter a description of the job in the **Task Description** field. • Enter the name of the Branch the job will be posted to in the **Enter Branch** field (the name is IFAP). • Enter the name of the Workarea the job will reside in the **Enter Workarea** field. • Select the username of the appropriate Reviewer in the **Content Approver** field. This person will be responsible for approving the content. • Click the **Run Job** button. The new job is created and appears on the Content Contributor's To Do List. • If the run job is rejected then ……(provide the rest of the procedures.)	• The **Work Area Button** should be visible, the **Work Area Button** has a **Folder** with a **Pencil** in the **Center** and is located directly below the **Edit Pull Down Menu.** • A **New Job Window** will appear asking you to select the **Workflow Template** you want to base the job on • A **New Job Template Window** will appear with different **Pull** Down Menus **and** Fields • Your **Job** is now entered in TeamSite

Viewing Tasks / Jobs in the To Do List

IFAP/Portal Team Views Task / Job In the To Do List

Process	Steps	What you will see!
IFAP/Portal team views their Task(s)/ Job in the To Do list.	**1.** Log in as an **Author** or higher and view the **To Do List**. • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. **2.** To view information about the task • Click the **Job Options** pull down menu • Click **Job Details** • You can view additional information on any specific job by clicking on the Description link (this link will contain the job description followed by a job ID number in parentheses. A new window will open displaying the job details. To exit this window, press the **Close** button. • Press the **Close** button to exit the Job Details window. **For WebDesk Users:** **1.** Log in as an **Author** or higher and view the **To Do List** • The task highlighted in blue on the top part of the WebDesk screen is the one whose details are displayed on the lower portion of the screen. The selected task is highlighted in blue. **2.** To Select a task • Click in the **Description**. There are three tabs on the lower half: **Task Details, Task Files,** and **Task Comments**. • Select the desired tab by clicking on the name. The current tab will appear in white, while the hidden tabs will appear shaded. The **Task Files** tab displays the files that are associated with the Task. There are four options the user has in this tab: • The **New Record** button creates a new Data Record. When this button is pressed, the user is prompted to select a Data Record Template. After selecting the correct template, press the **OK** button. The editor appears, and edit the Data Record accordingly. • The **New File** button allows the user to create a file (i.e. HTML, etc.) for the task. From the menu, select the proper template and type file name in the **New**	• The **To Do List** displays two **Pull Down Menus**: **Task Options**, on the **Left** side of the screen and **Job Options**, on the **Right** side of the screen. These menus allow you to obtain further information on the Tasks or Jobs • A **Job Details Window** will appear with the **Job Details**. • The current tab will appear in white, while the hidden tabs will appear shaded.

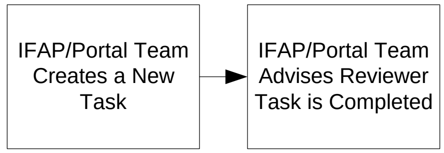
	File Name field. Press the **Create** button to create the file. • The **Attach Files** button allows users to attach an existing file to the task. Navigate to the directory the file is located in and press the **OK** button to attach the file. • The **List Changes** button lists the changes, if any, of all the files related to the task. When done viewing this window, press the **Close** button.	

Changing the Owner of Tasks / Jobs in the To Do List

IFAP/Portal Team changes the owner of a Task / Job In the To Do List

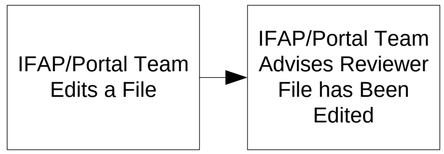
Process	Steps	What you will see!
IFAP/Portal Coordinator changes the owner of a specific task	**1.** Log in as an **Admin** or higher and view the **To Do List**. • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu.	• The **To Do List** displays two **Pull Down Menus**: **Task Options**, on the **Left** side of the screen and **Job Options**, on the **Right** side of the screen. These menus allow you to obtain further information on the Tasks or Jobs
	2. To view and modify the owner of a task • Click the **Job Options** pull down menu • Click **Job Admin**	• A **Job Details Admin** window will appear with the **Job Details**.
	3. To change the owner of a task • Click the **Select One** pull down menu • Click **Change Task Owner** • In the **Task Owner** text box, type the name of the new user you would like to own the task and click **Change** • Hit **Close** to exit the Job Admin window	• A **Change Task Owner** dialog box will appear with the current owner of the task in the text box • The **Job Admin** window will reappear with the name of the new owner next to the task

Creating a New Task



Process	Steps	What you will see!
IFAP/Portal team creates a new task based on the Content Managers request.	**1. Log in** as an **Author** or higher and view the **To Do List**. • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. **4. Add a Existing File – Update instructions** Click the **Task Options** pull down menu • Select **Start Task** or **Edit Task** • Click the **Select Task Operation** pull down menu on the right hand side of the window that appears • Select **Add Existing File** • Select the directory the file should reside in by clicking the desired Directory folder. There may also be subdirectories that appear after the main directory is chosen (**note** – if you select a subdirectory and want to move up to the main directory, select the yellow folder with the up arrow). • Select the file from the Directory Contents window. • Type the File Name in the **File Name** field (The File Name should *not* include the file extension such as .doc, .txt, .html. etc.). • Click the **OK** button to create the file. • The next time you view the Task Details for this task, the file you created will appear in the list of files associated with the task.	• Your **Tasks/ Jobs** will be visible and The **Work Area Button** will be displayed directly below the **Edit Pull Down Menu**
IFAP/Portal team member advises the Reviewer that the Task has been completed.	**Mark the Task Complete** • From the To Do List, go to the **Task Options** selection box next to the name of the task you want to mark as completed. • Remove the Lock on the file(s) • Select **Done** from the list. • Type any comments you want to send the Content Manager in the **Transition Comment** field • Click the **Transition to Next Task** button	• A TeamSite **Task Transition Window** will be displayed

Editing Files



Process	Steps	What you will see!
IFAP/Portal Team edits content file	**1.** Log in as an **Author** or higher • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. **2. Open the Task you want to Edit** • Click the **Task Options** drop down box next to the task that contains the file you want to edit. • Click **Edit File** button on the toolbar or **Edit File** from the **Edit** menu. • Maximize the **LaunchPad** window if it is minimized (it should appear after selecting Edit File/Data Record above). You can display the LaunchPad by selecting it from the Windows Start menu bar. **NOTE:** Which ever File Name Extension is used, the associated application program will be opened (.doc = Word, .xls = Excel, .ppt = PowerPoint). If you want to edit the file with a different application, select **Edit With** instead of the **Edit** button. **3.** The file will open in your editing application. Make the necessary changes to the document. **4. Save and Close** the document. (**note** – LaunchPad keeps track of which directory the file is located in, so you do not need to remember) • Maximize the LaunchPad Window if it is minimized. • Click once on the document you modified to highlight it (**note** – if changes were made to the document, the icon beside the filename will resemble a notepad with a pencil on it) • Click the **Upload** button. You will be prompted to either **Remove** or **Keep** a local copy of the file you are uploading. Removing the file will delete the file from your hard drive; while keeping the file keeps the copy on your hard drive. Choose the desired option (**note** -if you choose to keep the file, the icon next to the file changes to indicate no changes have been made to the file, since it is being uploaded to the workarea) • Close the TeamSite Launch Pad window by pressing the **Done** button.	• Your **Tasks /Jobs** will be visible and the **Work Area Button** will be displayed directly below the **Edit Pull Down Menu.** The **To Do List** displays two **Pull Down Menus**: **Task Options**, on the **Left** side of the screen and **Job Options**, on the **Right** side of the screen • The **TeamSite LaunchPad Window** will be displayed with your Document/s • To edit a file **NOT** on your **Tasks/Jobs** area, navigate to the directory containing the file you want to edit and click the check box next to that file. • Another **TeamSite LaunchPad**

Process	Steps	What you will see!
		Window will be displayed saying; Remove the Temporary Local Copies After Uploading • Closes the **Task File Window**
IFAP/Portal team member advises the Reviewer that the task has been completed.	**Mark the Task Complete** • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. • Remove the Lock on the file(s) • Select **Done** from the list. • Type any comments you want to send the Reviewer in the **Transition Comment** field • Click the **Transition to Next Task** button	• A TeamSite **Task Transition Window** will be displayed • Closes the **Task Transition Window**

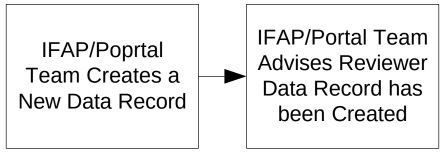
Importing/Editing Files and Content not in TeamSite™

IFAP/Portal Team Downloads File to be Edited → IFAP/Portal Team Imports file into TeamSite → IFAP/Portal Team Edits a File → IFAP/Portal Team Advises Reviewer File has Been Edited

Process	Steps	What you will see!
IFAP/Portal Team downloads file to be edited	**1.** Connect to the WWW and determine which page you would like to edit. • Choose **File>Save As** and save the file as an htm or html file type.	• A save file dialog box. Make sure to save the file to a location you will remember.
Import the files into TeamSite to edit content	**2. Find the location you would like to save the file in** **3. Import the file** • From the menu bar, select **File>Import** • Browse to the location of the file you wish to upload and select the file and select the **Add** button • Click the **Import** button to import all files to TeamSite	• In the WorkArea, a box will appear that you may browse to the location of the file you wish to upload • Your file will appear in the "FilePath" box below that you will be uploading
Edit Content	**4. Open the content you want to Edit** • Find the location of the file you have just imported • Click **Edit File** button on the toolbar or **Edit File** from the **Edit** menu. • Maximize the **LaunchPad** window if it is minimized (it should appear after selecting Edit File/Data Record above). You can display the LaunchPad by selecting it from the Windows Start menu bar. **NOTE:** Which ever File Name Extension is used, the associated application program will be opened (.doc = Word, .xls = Excel, .ppt = PowerPoint). If you want to edit the file with a different application, select **Edit With** instead of the **Edit** button. **3.** The file will open in your editing application. Make the necessary changes to the document. **4. Save and Close** the document. (**note** – LaunchPad keeps track of which directory the file is located in, so you do not need to remember) • Maximize the LaunchPad Window if it is minimized. • Click once on the document you modified to highlight it (**note** – if changes were made to the document, the icon beside the filename will resemble a notepad with a pencil on it) • Click the **Upload** button. You will be prompted to either **Remove** or **Keep** a local copy of the file you are uploading. Removing the file will delete the file from your hard drive; while keeping the file keeps the copy on your	• Your **Tasks /Jobs** will be visible and the **Work Area Button** will be displayed directly below the **Edit Pull Down Menu.** The **To Do List** displays two **Pull Down Menus**: **Task Options**, on the **Left** side of the screen and **Job Options**, on the **Right** side of the screen • The **TeamSite LaunchPad Window** will be displayed with your Document/s • To edit a file **NOT** on your **Tasks/Jobs** area, navigate to the directory containing the file you want to edit and click the check box next to that file.

Process	Steps	What you will see!
	hard drive. Choose the desired option (**note** -if you choose to keep the file, the icon next to the file changes to indicate no changes have been made to the file, since it is being uploaded to the workarea) • Close the TeamSite Launch Pad window by pressing the **Done** button.	• Another **TeamSite LaunchPad Window** will be displayed saying; Remove the Temporary Local Copies After Uploading • Closes the **Task File Window**
IFAP/Portal team member advises the Reviewer that the task has been completed.	**Mark the Task Complete** • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. • Remove the Lock on the file(s) • Select **Done** from the list. • Type any comments you want to send the Reviewer in the **Transition Comment** field • Click the **Transition to Next Task** button	• A TeamSite **Task Transition Window** will be displayed • Closes the **Task Transition Window**

Create a New Data Record



Process	Steps	What you will see!
IFAP/Portal team memeber completes a New Data Record.	**1.** Log in as an **Author** or higher • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. **2. Creating the New Data Record** • Click the **Task Options** pull down menu next to the job you want to create the Data Record in • Select **Start Task** or **Edit Task** • Click the **Select Task Operation** pull down menu on the right side of the screen • Click **New Data Record** • Navigate through the directories on the “Select a category and type” screen to select the template type you wish to use for this Data Record. When the desired template appears in the “Template Type” box, press the **OK** button. • At this point, you may be prompted to install VisualFormat (the installation is a one-time occurrence). If this screen appears, follow the on-screen instructions to install the program. • The selected Data Record template will appear on the screen. Each template will differ in various ways, but the basic features are the same: there is a navigation pane on the left-hand side of the window that allows you to quickly move to the part of the DCR you want to. The right hand side of the window contains the data for the DCR. • Type your information in each Field **NOTE:** There are **Five** options at this point (**Save, Save As, Preview, Generate, and Close**). **3a.** By clicking **Save**, your **New Data Record** will be saved and displayed by which Template you choose **3b.** By clicking the **Save As**, your **New Data Record** will be saved with the name you give to it at the prompt. **3c**. The **Preview** button will display a preview of the document being created in the browser. You must save the	• Your **Tasks/ Jobs** will be visible and the **Work Area Button** will be displayed **Directly Below** the **Edit Pull Down Menu** . • A TeamSite **Task Details Window** will be displayed • A **New Data Record Window** will be displayed

Process	Steps	What you will see!
	file before previewing it. **3d.** The **Generate** button will generate the HTML document from the DCR data entered. The record must be saved before generating the HTML document. **3e.** The **Close** button closes the current window without having to save change made.	
IFAP/Portal team memeber advises the Reviewer the New Data Record has been Completed.	**Mark the Task Complete** • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. • Remove the Lock on the file(s) • Select **Done** from the list. • Type any comments you want to send the Reviewer in the **Transition Comment** field • Click the **Transition to Next Task** button	• A TeamSite **Task Transition Window** will be Displayed • The next task is displayed

Viewing Comments From An Author or Higher

IFAP/Portal Team Views Coments From The Author

Process	Steps	What you will see!
IFAP/Portal Team views comments from the Author.	**Log on** as an **Editor** or **Higher** • Click the **To Do** Button if the Tasks are not displayed • Click the **Job Options** pull down menu on the right side of the screen • Select **Job Details** • Click the **Close Button** when finished viewing comments	• A **Job Details Window** will be displayed with the Authors Comments

Viewing All Jobs

IFAP/Portal Team Views Available Jobs

Process	Steps	What you will see!
View all available jobs.	**Log on** as an **Author** or **Higher** • Click the **To Do** Button if the Tasks are not displayed (**note** – You can also select the **To Do List** option from the **View** pull down menu)	• A list of **All Jobs** on TeamSite will be displayed (there may be jobs that are not IFAP-related)

Locking and Unlocking Files Using Submit Locking

Locking Files Using Submit Locking

Unlocking Files

This section covers how to Lock Files using Submit Locking and how to Unlock files. TeamSite supports three different types of File Locking: 1) Submit Locking, 2) Optional Write Locking, and 3) Mandatory Write Locking. TeamSite is configured to support only Submit Locking so you won't have to execute Optional Write Locking and Mandatory Write Locking. Submit Locking allows only the user who locks the file to submit it to the Staging Area. Other users are allowed to edit a locked file in their Work Area, however, the user who holds the lock must release (i.e. unlock) it before it can be submitted to the Staging Area.

Locking Files Using Submit Locking

Locking Files Using Submit Locking

Process	Steps	What you will see!
HOW TO LOCK FILES USING THE SUBMIT LOCKING METHOD.	**NOTE:** You must be an **Editor or Higher** to Lock Files **Log in** as an Editor or Higher • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. **NOTE:** Make sure you are in your **Work Area** by clicking the **Work Area** button • Navigate to the **Directory** where the file is located that you want to lock • Click the Checkbox next to the name of the file • Click the **Edit** pull down menu • Select **Lock** • Type any comments you have in the **Comments** field. **NOTE:** The Lock Function will automatically compare the version in the Work Area and the version in the Staging Area (if there is a version in the Staging Area) and take the most recent. • If you want to keep the version in your Work Area, whether or not it is newer, deselect the **Get Latest** checkbox • Click the **Lock** button	• The **Work Area Button** should be visible, the **Work Area Button** has a **Folder** with a **Pencil** in the center and is located directly below the **Edit Pull Down Menu.** • An **Enter Lock Comments Window** will appear. • TeamSite will lock the File(s)

Unlocking Files

Unlocking Files

Process	Steps	What you will see!
How to Unlock Files.	**NOTE:** You must be an **Editor or Higher** to Unlock Files **Log in** as an Editor or Higher • To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. You can also select the **To Do List** option in the **View** pull down menu. **NOTE:** Make sure you are in your work area by clicking the **Work Area** button • Click the directory where the file is located that you want to unlock • Click the checkbox next to the file/s you want to unlock (**note** – a locked file will have a picture of a key in the icon next to the file name) • Click the **Edit** pull down menu • Select **Unlock**	• The **Work Area Button** should be visible; the **Work Area Button** has a **Folder** with a **Pencil** in the center and is located directly below the **Edit Pull Down Menu.** • The File/s are **Unlocked**

Approving / Rejecting and Deleting Content

Reviewer Approves Content	Reviewer Rejects Content	IFAP/Portal Team/ Content Manager Deletes Content

This section covers the procedures for the Reviewer to Approve or Reject the Task. This section will also show how to delete content.

Approving Content

Reviewer Approves Content

Process	Steps	What you will see!
Reviewer approves tasks.	**Log in** as an **Editor** or **Higher** • Click **To Do Button** if the **Tasks** are not displayed • Click the **Task Options** pull down menu next to the job that awaits approval • Select **Approve** • Type your comments in the **Transition Comment** field • Click the **Transition to Next Task** button (**note** – pressing this button will send the documents to the staging area)	• A **Task Transition Window** will be displayed

Rejecting Content

Reviewer Rejects Content

Process	Steps	What you will see!
Reviewer Rejects tasks.	**Log on** as an **Editor** or higher • Click the **To Do** button if the tasks are not displayed • Click the **Task Options** pull down menu • Click **Reject** • Type your comments in the **Transition Comment** field • Click the **Transition to Next Task** button (**note** – the Author can now log in and view the comments made by the reviewer. The rejection should appear as another task with a separate ID)	• A **Task Transition Window** will be displayed

Removing Files from Workarea

IFAP/Portal Team Deletes File from Workarea

Process	Steps	What you will see!
IFAP/Portal Team Member Removing Files from Workarea	**Log on** as an **Author** or **Higher** • Enter your work area • Navigate to the directory where the file is located • Click the checkbox next to the File/s you want to delete in your work area (**note** – you can check more than one file to delete) • Click the **File** pull down menu • Click **Delete** • Click the **OK** button if you want to delete the file **NOTE:** The list of files in your work area will be updated to reflect the deletions. If the files are not updated, click the **Refresh** button.	• A **Window** will appear asking you to **Delete Selected File, Are You Sure?**

Removing Files from Staging

IFAP/Portal Team Deletes File from Staging

Process	Steps	What you will see!
IFAP/Portal Team Member Removing Files from Staging	**Log on** as an **Author** or **Higher** • Make sure you have deleted the files from your work area (See "Removing files from Workarea") • List modified files in that workarea. The deleted file in your workarea will have a deleted files icon (a document with a red X over it). • From the list of modified files, select the deleted file. Click the **Submit** button on the toolbar, or select **File>Submit.** **NOTE:** The list of files in your work area will be updated to reflect the deletions. If the files are not updated, click the **Refresh** button.	• A **Window** will appear asking you to **Delete Selected File, Are You Sure?**

3.0 Definitions

Administrator – The owner of a branch, responsible for the project being developed on it. An Administrator can perform all the functions that an Author or an Editor can, and can also create and delete new sub-branches and workareas on that branch. Administrators exercise control over workflow by giving workareas to editors and sub-branches to other administrators.

Author – A primary web content contributor with limited access to the TeamSite™ system. Authors can access, create, and modify web content through their Editors' workareas. An Editor can assign specific files to an Author, which will appear in the Author's To Do list.

Branch - a path of development for a body of content developed and maintained by a team. Each branch contains one or more work areas, a staging area, and a published edition and may contain sub-branches and previous editions. When entering branch information, it must always be "ifap". **Note:** Interwoven is case sensitive.

Comment - A note attached to a file, directory, work area, branch, edition, job, or task. Comments can be attached to work areas, branches, and editions when they are created. Comments can be attached to files and directories when they are assigned, returned, rejected, locked, or submitted. Global comments can be set when these functions involve multiple files.

Compare - A function that displays a list of the differences between any two TeamSite objects. Objects that can be compared include work areas, staging areas, or editions.

Conflict - Occurs when multiple users make changes to the same file in multiple locations, e.g. when a file had been changed in two different work areas.

Conflicting Edits - Occur when multiple users make changes to the same parts of the same file, producing two versions of the file that cannot be automatically merged. Conflicting edits require users to specify which individual changes will go into the merged version.

Content Contributor- Ideas are formulated within the business units by Content Contributors. The Content Contributor documents his/her idea in the appropriate format for the Content Manager in his/her business unit.

Content Manager- Content Managers will review and approve the content and send an email request to the Schools Channel Customer Service Call Center. The Content Manager provides a description of the work to be done and attaches any necessary files to the email.

Edition - A frozen, read-only snapshot of a branch of development. An edition contains a copy of all the files in the staging area at the time it was published. New editions can be released to production servers as complete, functional websites. Editions also serve as rollback points for projects in development, and they provide back archives of the website.

Editor - Editors own work areas within their channel's sub-branch. They can create and edit content, just as Authors do, but they are primarily responsible for managing the development taking place within their work areas. Editors are generally "managerial" users, who primarily supervise the work of Authors, or self-managing "power" users, who need additional functionality to manage their own content.

History - A complete record of all changes that have been made to a file through time. A user can see the complete history of a file by selecting it and selecting **History** from the **View** menu.

Home Page - A user's overview of the TeamSite system. By default, an Author's Home Page will display his / her Task list. An Editor's or Administrator's Home Page will display an overview of the TeamSite system. The Home Page can be set to any directory where the user has access.

IFAP/Portal Coordinator- receives email requests from Content Managers, prioritizes these requests and assigns the requests to an IFAP/Portal Team Member.

IFAP/Portal Team Member- Any user of TeamSite that creates or modifies content for the website.

Initial Edition - The first edition on a newly created branch. The initial edition serves as the original source of content for all work areas on a new branch. This edition may be empty, or it may be a copy of an edition from another branch.

Job - A set of interdependent tasks. Each job is a specific instance of a workflow model.

Locking - Restricting file assess within a branch. Locking a file reduces the possibility of conflicting edits but also reduces the team's ability to work on files simultaneously. Every time a file is locked, the version in the work area is compared with the version in the staging area and the latest is taken. TeamSite supports three types of locking, or locking models: Submit Locking, Optional Write Locking, and Mandatory Write Locking. The locking model is defined at the branch level by the Administrator. Submit Locking is the only available locking model for FSA unless the Administrator changes this locking model.

Main Branch - The first branch created when TeamSite is installed. The Master owns the main branch. All branches in the TeamSite system are subordinate to the main branch.

Master - The owner of the main branch. The Master user's is responsible for the entire Web site. The Master organizes the structure of the TeamSite and coordinates the activities of all users', and can also perform all functions on all branches.

Merge - The process of reconciling conflicts between versions of a file that have been edited by two people. The two versions can be merged in the staging area to produce a new version of the file, incorporating changes made by both users. Merging can be automated with TeamSite's Advanced File Merging.

Navigation Window - The left-hand side of the TeamSite window, which allows you to navigate through TeamSite by clicking on the underlined names of branches, work areas, staging areas, editions, or directories.

Open Deploy - Allows the transfer of website content from the development server to the production server.

Publish - To create a new edition based on the current staging area.

Reviewer- This person will be responsible for approving or rejecting the content after it is created or updated.

SmartContext - The use of individual work areas and staging areas to allow user's to test their work in the context of the entire website without actually deploying the website. This allows Authors, Editors, and Administrators to catch and fix their own mistakes at an early stage.

SmartContext Editing - The ability to edit a file while browsing the website. This provides a simple, intuitive way of finding the file your want to edit, editing it in context and see your changes immediately.

Staging Area - The area where users integrate the contents of work areas. User's submit read-only copies of files from their work areas to the staging area to integrate with other contributions, and test the integrity of the resulting entire website.

Submit - The act of transferring website content form a work area to the staging area.

Task - A unit of work performed by a single user or process. Each task in a job is associated with a particular TeamSite work area and carries a set of files with it.

TeamSite Templating - A TeamSite module that allows you to configure the look and feel of your Web pages.

Template - A file that specifies attributes of another file, such as look and feel. When you create a file, you can choose to base that file on a template.

To Do List - A user's initial view of the TeamSite system. The To Do List shows the user which tasks and jobs he / she is responsible for, and allows the user to do the necessary work to complete the tasks.

User - A TeamSite Author, Editor, Administrator, or Master.

Work Area - a virtual copy of a website, which may be worked on independently without affecting the actual site or the work of other contributors.

Workflow - A system for defining the necessary processes for content creation and approval.

Work Window - The right-hand side of the TeamSite screen, which allows you to navigate and manipulate files within TeamSite.

4.0 Using WebDesk

A user can log into TeamSite™ using the WebDesk interface. WebDesk is only available to users who log in as Authors; and the functionality is the same as if logged into the normal interface. The following are instructions on how to perform the various tasks using WebDesk.

Logging Into TeamSite ä

From the Login screen, enter your Username, Password, and select **Author** as your "Login as" type.

Check the WebDesk checkbox and press the **Login** button.

Viewing Tasks/Jobs

The WebDesk interface is a split-screen view that displays all the tasks the user owns on the top half of the screen; while the details for a given task are displayed on the bottom half of the screen.

The task highlighted in blue on the top part of the WebDesk screen is the one whose details are displayed on the lower portion of the screen. The selected task is highlighted in blue. To select a task, click in the Description. There are three tabs on the lower half: **Task Details, Task Files,** and **Task Comments**. Select the desired tab by clicking on the name. The current tab will appear in white, while the hidden tabs will appear shaded.

The **Task Details** tab displays the following information:

- The Task Description
- The Task Name
- The Workarea the task resides in
- The Task ID Number
- The Job Description that the Task is linked to
- The Task Owner
- The creator of the Job that the Task is linked to
- The Job ID Number the Task is linked to

The **Task Files** tab displays the files that are associated with the Task. There are four options the user has in this tab:

- The **New Record** button creates a new Data Record. When this button is pressed, the user is prompted to select a Data Record Template. After selecting the correct template, press the **OK** button. The editor appears, and edits the Data Record accordingly.
- The **New File** button allows the user to create a file (i.e. HTML, etc.) for the task. From the menu, select the proper template and type file name in the **New File Name** field. Press the **Create** button to create the file.
- The **Attach Files** button allows users to attach an existing file to the task. Navigate to the directory the file is located in and press the **OK** button to attach the file.
- The **List Changes** button lists the changes, if any, of all the files related to the task. When done viewing this window, press the **Close** button.

The **Task Comments** tab allows users to add a comment to the task. To add a comment, type the desired comment in the space beneath the **Add Comment** button. When finished, press the **Add Comment** button.

Viewing Workareas

The **Files** tab on the top of the screen allows users to view their workareas. Selecting the **Files** tab brings up a view similar to the workarea view in the normal interface view. There are four buttons to choose from: **Browse, File, View,** and **Submit**. The **Browse, File**, and **View** buttons contain similar commands as the drop down menus of the normal TeamSite™ interface; while the **Submit** button performs the same function as the Submit command in the normal interface.

Miscellaneous Items

The following is a list of miscellaneous items found in the TeamSite™ WebDesk interface:

- The **Logout** button is located near the upper right-hand corner of the browser.
- The **Refresh** button is located near the upper right-hand corner of the browser, next to the **Logout** button. When refreshing, use this button, *not* the browser button on the Web Browser toolbar.
- The **Add to Favorites** button acts similar to a bookmark. If you are working in a specific directory and want to return to that area upon logging on again, pressing this button will bookmark the directory; and you will return to that directory when you log in next time.